

**APPLICATION FOR
COUNTY OF SANTA BARBARA
BOARD, COMMISSION OR COMMITTEE**

Return to: Clerk of the Board of Supervisors
105 E. Anapamu Street, Room 407
Santa Barbara, CA 93101

DATE RECEIVED

2016 JUL 14 PM 4: 58

Copy to Supervisor

Instructions: Please complete each section below. Be sure to enter the title of the Board, Commission or Committee (only one per application) for which you desire consideration in Box 1. For more complete information or assistance, contact the Clerk of the Board of Supervisors. **Please print in ink or type. Please note that ALL information provided is a matter of public record, and is subject to disclosure.**

COUNTY OF SANTA BARBARA
CLERK OF THE
BOARD OF SUPERVISORS

1. **APPLYING FOR:** (Use Specific Title of Board, Commission or Committee)

Board appointed Trustee on the County's Retirement Board

2. **TODAY'S DATE:**

July 14, 2016

3. **NAME:**

Vidal Michael Anthony
Last First Middle

4. **E-MAIL ADDRESS:**

6. **ADDRESS:**

Number Street
City Zip Code

5. **TELEPHONE:**

Home: _____

Business: _____

7. **REFERENCES:** Give names and addresses of three (3) individuals (not relatives) who have knowledge of your character, experience, community involvement, and abilities.

NAME	ADDRESS	TELEPHONE	OCCUPATION
Salud Carbajal			County Supervisor
Jason Dominguez			City Councilman
Molara Vadnais			Executive Director Legal Aid Foundation

8. **Are you, or have you ever been, employed by the County of Santa Barbara?**

No Yes - if yes, list below

Department: _____ Title: _____ Date: _____

9. **PLEASE CHECK APPROPRIATE BOXES (OPTIONAL):**

Ethnic or Racial Identity:

- White
 African American
 Hispanic
 Asian/Pacific Islander
 Native American/Alaskan Native
 Other (please specify): _____

- Sex:
 Male
 Female

10. **EDUCATION COMPLETED:**

UCSB, Business/Economics and Sociology

11. **INDICATE SUPERVISOR WHO WILL RECEIVE A COPY OF APPLICATION:**

Janet Wolf and Peter Adam

12. **EXPERIENCE:** Please explain why you are interested in serving, and what experience you bring to the Committee. Attach additional documentation as necessary.

Reference attachment

13. **ADDITIONAL INFORMATION:** Give any information explaining qualifications, experience, training, education, volunteer activities, community organization memberships, or personal interests that bear on your application for the above Board, Commission or Committee. Attach additional sheets as necessary.

Reference attachment

14. **SIGNATURE OF APPLICANT:**

Questions 12 & 13. Experience and additional information:

I first started getting involved with public service when I was going to school at UCSB, but getting much more deeply involved in public service in 2009 when I became a board member for Legal Aid Foundation of Santa Barbara County where I still serve.

I have fourteen years of experience in the financial industry. Before starting my own practice, Cornerstone Wealth Management Services, and joining Cornerstone Insurance Services LLC as a Partner; I was responsible for all of community banking for Wells Fargo Bank in Santa Barbara, Ojai, and Buellton. Working in a leadership capacity has helped me in my career with starting my own business and working with my existing clients. Back in 2007 I completed my Series 7 and 66, along with Life & Health licenses. Working as a CERTIFIED FINANCIAL PLANNER™ I take a holistic perspective with managing a client's estate/assets; specializing in asset protection models (or asset management) and risk management strategies, but by also working with CPA's and attorneys when it comes to tax strategies and legal instruments.

I also teach the Risk Management courses and Retirement Planning Courses at UCSB Extensions, in their Business Management & Law program. The University is dissolving this department at the end of this year, which will create even more time for me. Having the experience of teaching Retirement Planning and Risk Management at UCSB Extensions has helped me with different techniques to explain insurance and investments to my clients—for example if I am in an individual setting where I am explaining their retirement plan to them or an employee benefits package to a CEO of a company.

The opportunity of serving as a Trustee on the County's Retirement Board seems like a seamless position for me because of what I do in my own practices, which involves asset management and risk management experience (especially in understanding employee benefits, for example, disability benefits or retirement benefits). Being both a producer and leader for a large organization and my own practices has given me the opportunity (and experience) of working with a diverse group of individuals and organizations and learning how to connect with everyone and create common ground and understanding. Lastly, being self-employed gives me a lot of freedom and flexibility to be able to commit to this role for an 8-year term and ability to dedicate the time needed to get the job accomplished at a high level.

Michael Vidal, CFP®